MONITORING, EVALUATION AND RESULTS MANAGEMENT

October 2025

SCCI
STRENGTHENING CLIENT CAPACITY FOR IMPACT

THE WORLD BANK
IBRD • IDA | WORLD BANK GROUP

LEARNING OBJECTIVES

After the session, participants will be able to:

- ✓ Define and explain key Result-Based management concepts
- ✓ Describe how the key components (goals, outcomes, outputs, and indicators) of a Results Framework
- ✓ Identify various risks (financial, political, environmental, etc.) that may impact development outcomes

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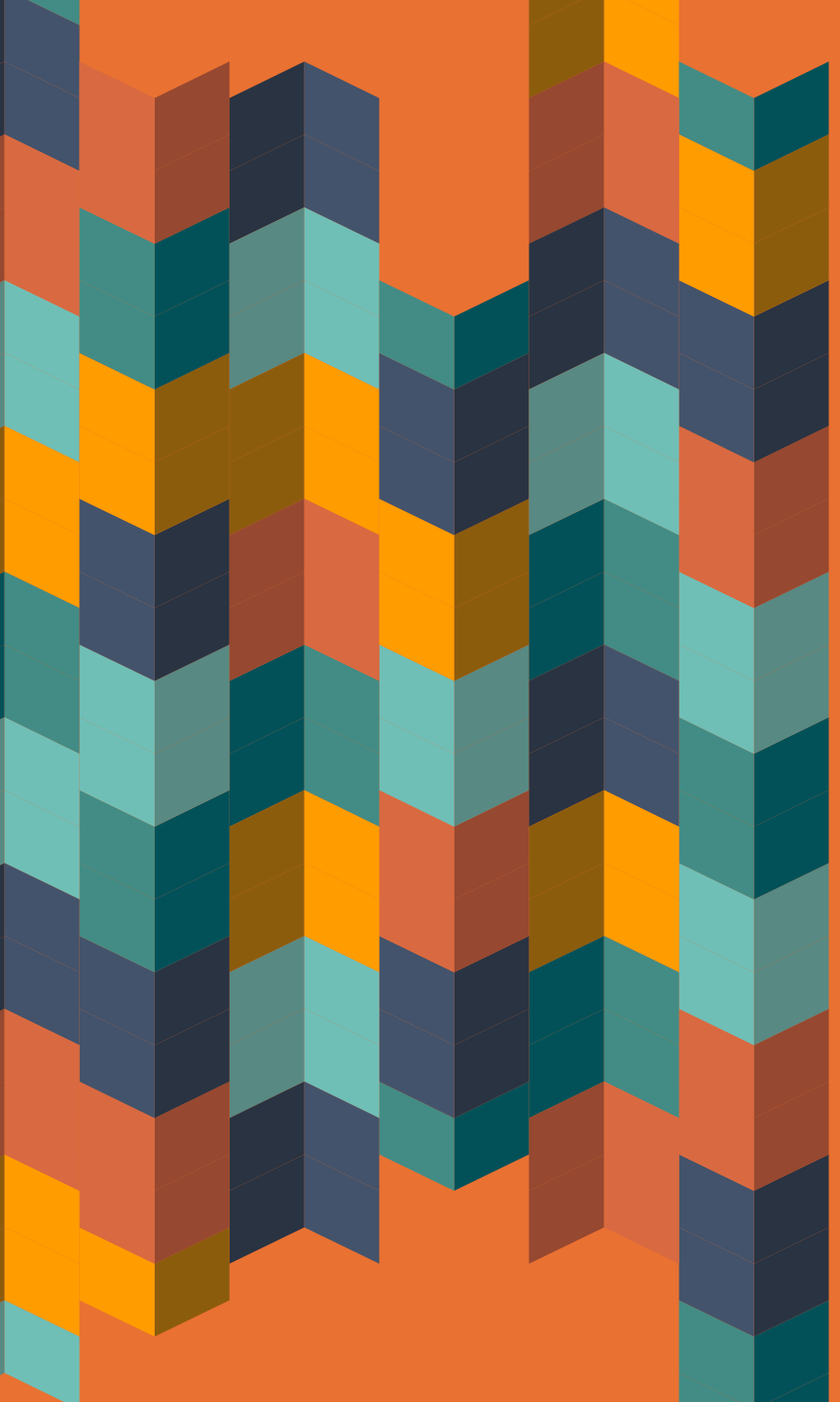

SESSION OUTLINE

- Key definitions in Result-Based Management
- Results-Based Management during project implementation
- New World Bank Group Scorecard

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Why is it important to check on a project's progress?

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WBG SCORECARD

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The Scorecard is part of the **WBG Evolution**

Moving from Vision to Impact

NEW VISION & MISSION

"Creating a world free of poverty – on a livable planet."

NEW SCORECARD

The WBG has a unified Scorecard for IDA, IBRD, IFC, and MIGA.

FINANCING MODEL

NEW PLAYBOOK

Source: World Bank Group News (2023). Remarks by World Bank Group President Ajay Banga at the 2023 Annual Meetings Plenary. Link.

"This scorecard will be our yardstick of accountability and a guidepost that our teams can rally around and work toward."

Remarks by World Bank Group President Ajay Banga at the 2023 Annual Meetings Plenary

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THE SCORECARD MEASURES RESULTS ACROSS 15 OUTCOME AREAS

ALIGNED WITH THE SDGS

1
Protection for the Poorest

2
No Learning Poverty

3
Healthier Lives

4
Effective Macroeconomic and Fiscal Management

5
Green and Blue Planet and Resilient Populations

6
Inclusive and Equitable Water and Sanitation Services

7
Sustainable Food Systems

8
Connected Communities

9
Affordable, Reliable and Sustainable Energy for All

10
Digital Connectivity

11
Digital Services

12
Gender Equality

13
Better Lives for People in Fragility, Conflict, and Violence

14
More and Better Jobs

15
More Private Investment

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The Scorecard has four building blocks: vision, client context, WBG results indicators, and results narratives

VISION

OUR VISION IS A WORLD FREE OF POVERTY ON A LIVABLE PLANET

Aspiration

PEOPLE

Global population headcount living in poverty
(at $2.15/day and $6.85/day)

PROSPERITY

Global average income shortfall from a prosperity standard of $25/day

Number of countries with high inequality

PLANET

Global greenhouse gas emissions
(gigatons of CO_2 equivalent)

Millions of people highly vulnerable to climate risks globally *

Millions of hectares of healthy terrestrial ecosystems globally *

Millions of people facing food and nutrition insecurity globally

Percentage of people with access to basic drinking water, sanitation services, and hygiene globally

** New indicator*

THE SCORECARD CAPTURES THE CORE OF WHAT THE WBG WILL DO

CLIENT CONTEXT | **WBG RESULTS** | **NARRATIVES**

Results narratives articulate the contributions of WBG support for institutional and policy reforms, not fully reflected in the data reported

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RESULTS-BASED MANAGEMENT

Key Definitions

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WHAT IS RESULTS-BASED MANAGEMENT?

- **Results-Based Management**: Approach used to focus on the achievement of development outcomes.
- **Development Outcomes**: Effects that the operation will have on the beneficiaries or organizations in terms of changed behavior or improved performance. It defines the operation's effectiveness.

Outcomes are not

Things, outputs or activities

- Number of schools built
- Kilometers of roads rehabilitated

Outcomes are

The effect of operation's outputs on the beneficiaries

- Students' knowledge and skills improved
- Farmers transport time and costs reduced

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WHY IS RESULTS MONITORING AND EVALUATION (M&E) IMPORTANT?

M&E is **positively correlated** with achieving project **outcomes** when incorporated into project management

Project Management	Lessons Learned/ Assuring stakeholders	Accountability
• Improving planning and budgeting • Focusing implementation and reporting	• Building “knowledge” & “learning” culture • Marketing success to secure political & public support	• Demonstrating results against money spent • Providing evidence that the program is producing desired benefits

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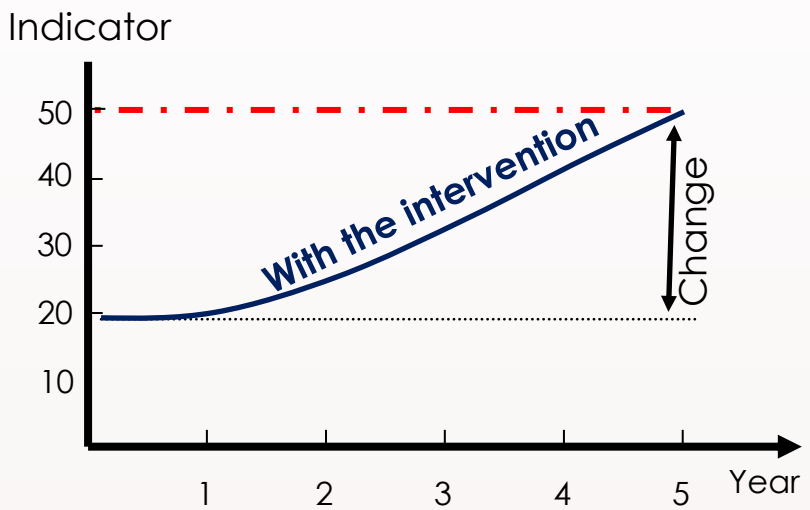
MONITORING

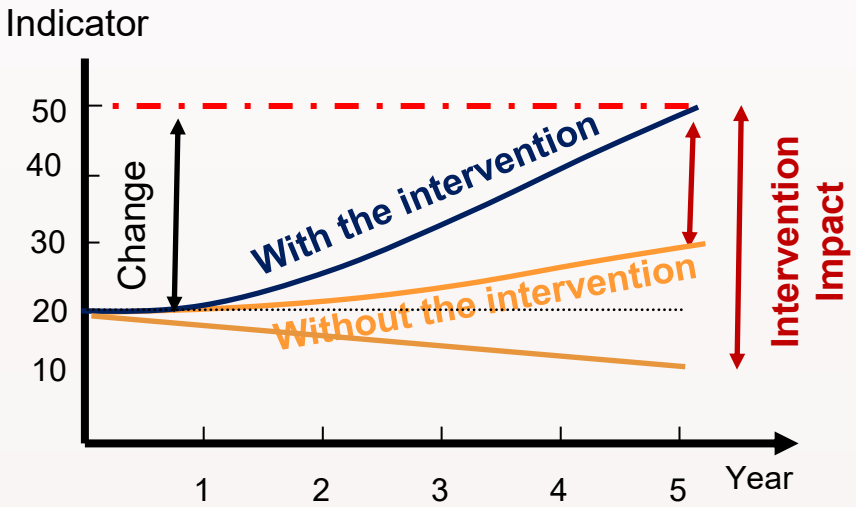
Regular collection and reporting of information to track whether actual results are being achieved as planned (internal management activity)

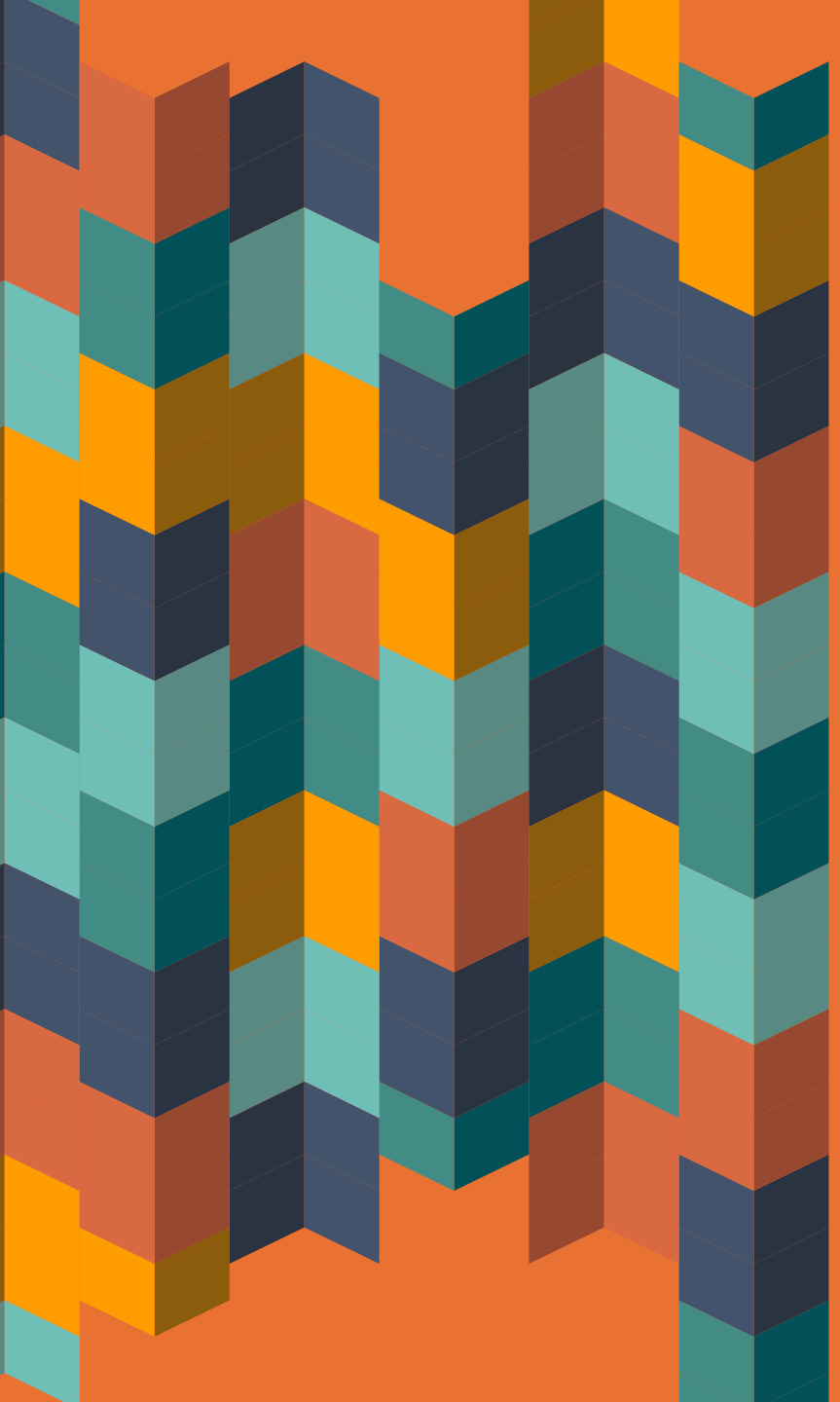


EVALUATION

Periodic assessment

- to answer specific questions about performance and results **(Efficiency and Effectiveness)**
- to determine **the causal relationship** between an intervention and its outcomes **(attribution/evidence)**





RESULTS-BASED MANAGEMENT

Project Implementation

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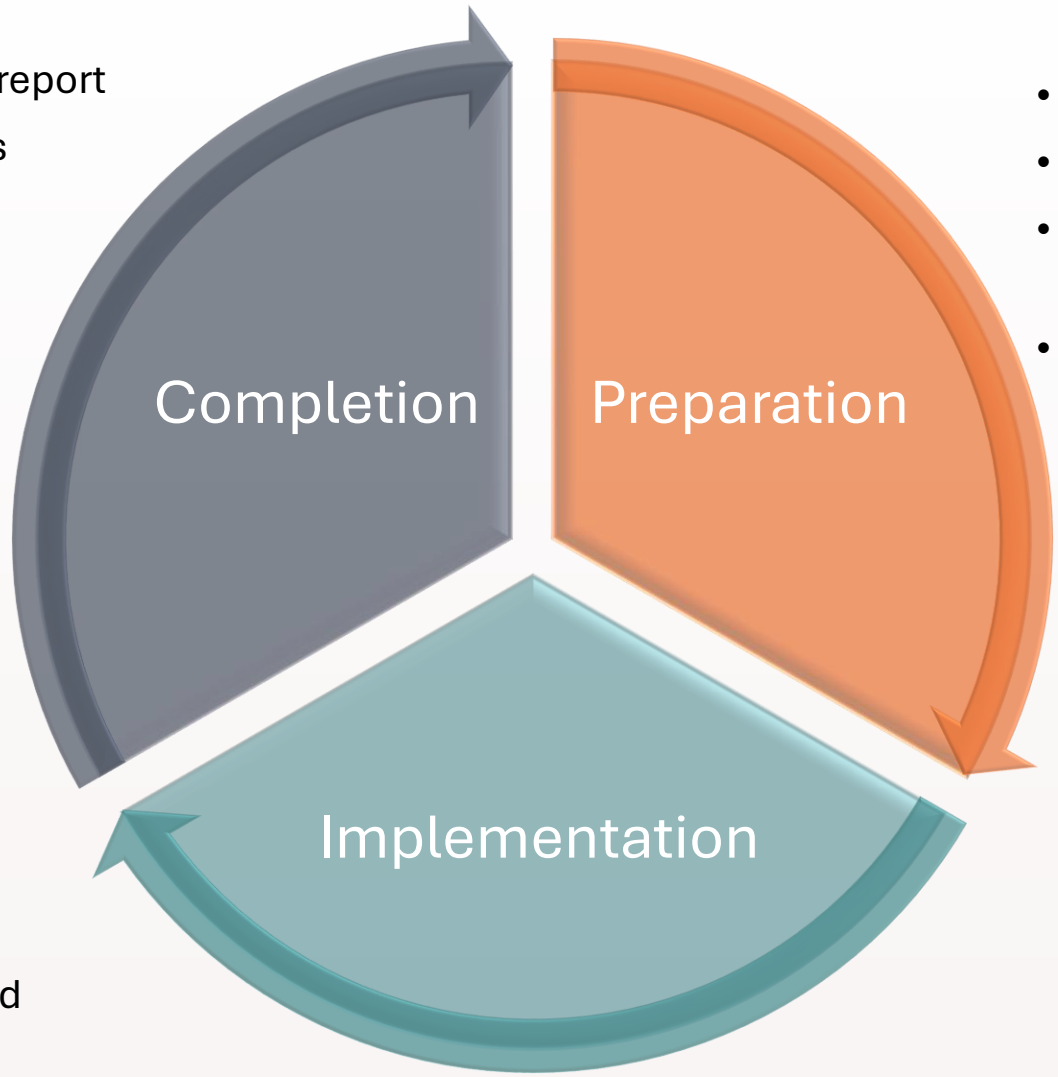
RESULTS MANAGEMENT THROUGHOUT THE PROJECT CYCLE

- Develop Theory of Change (TOC)
- Define PDO
- Develop results framework (RF) and M&E Plan
- Assess M&E Capacity



- Prepare the implementation completion report
  - Evidence of achievements and impacts
  - Validate TOC
  - Document lessons learned
- Prepare handover of the M&E system for sustainability

- Finalize M&E arrangements in M&E Manual/Chapter, as part of POM
- Set up M&E system
- Report on implementation progress and results
- Mid-Term Review
- Adapt project design, TOC, RF, and implementation arrangements, as needed

PREPARATION

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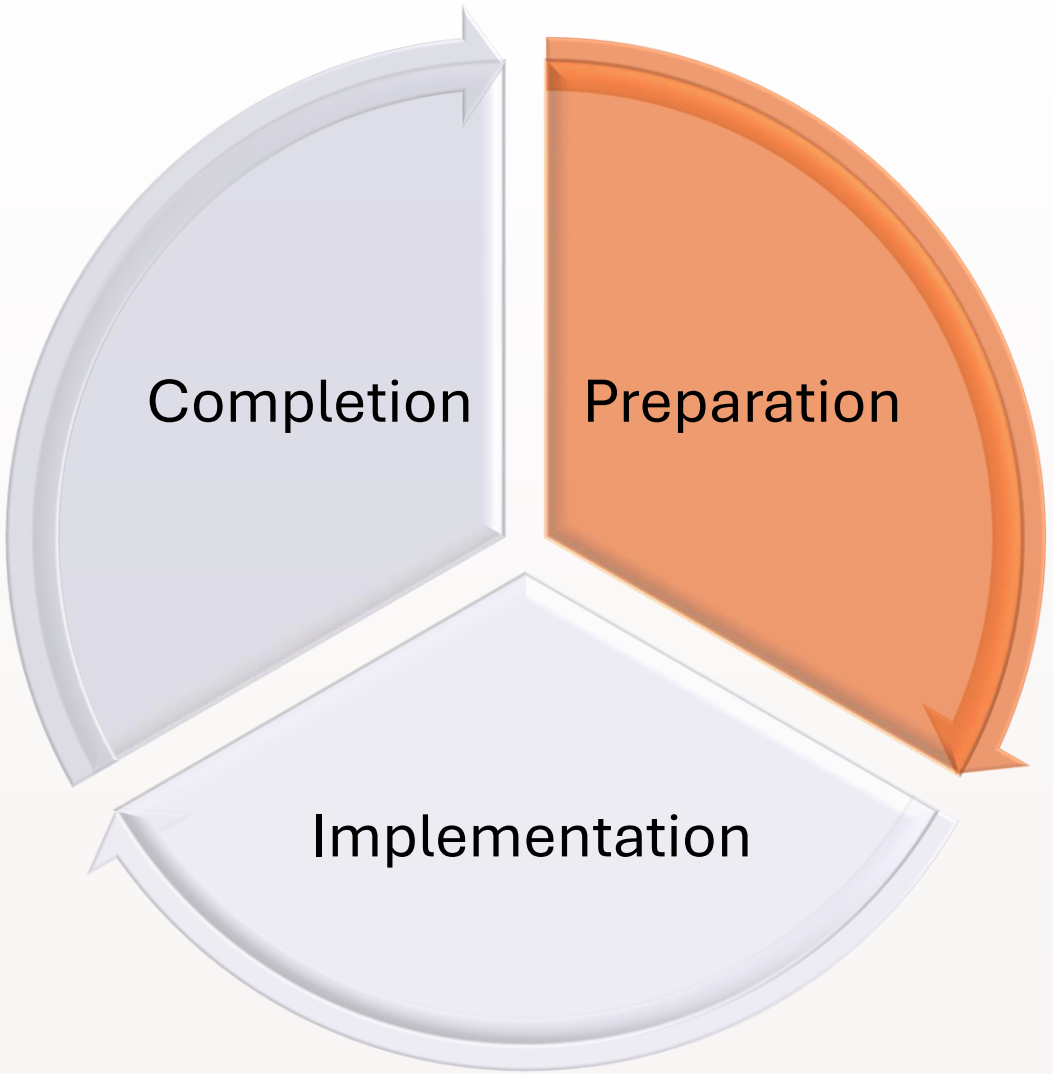
RESULTS MANAGEMENT THROUGHOUT THE PROJECT CYCLE



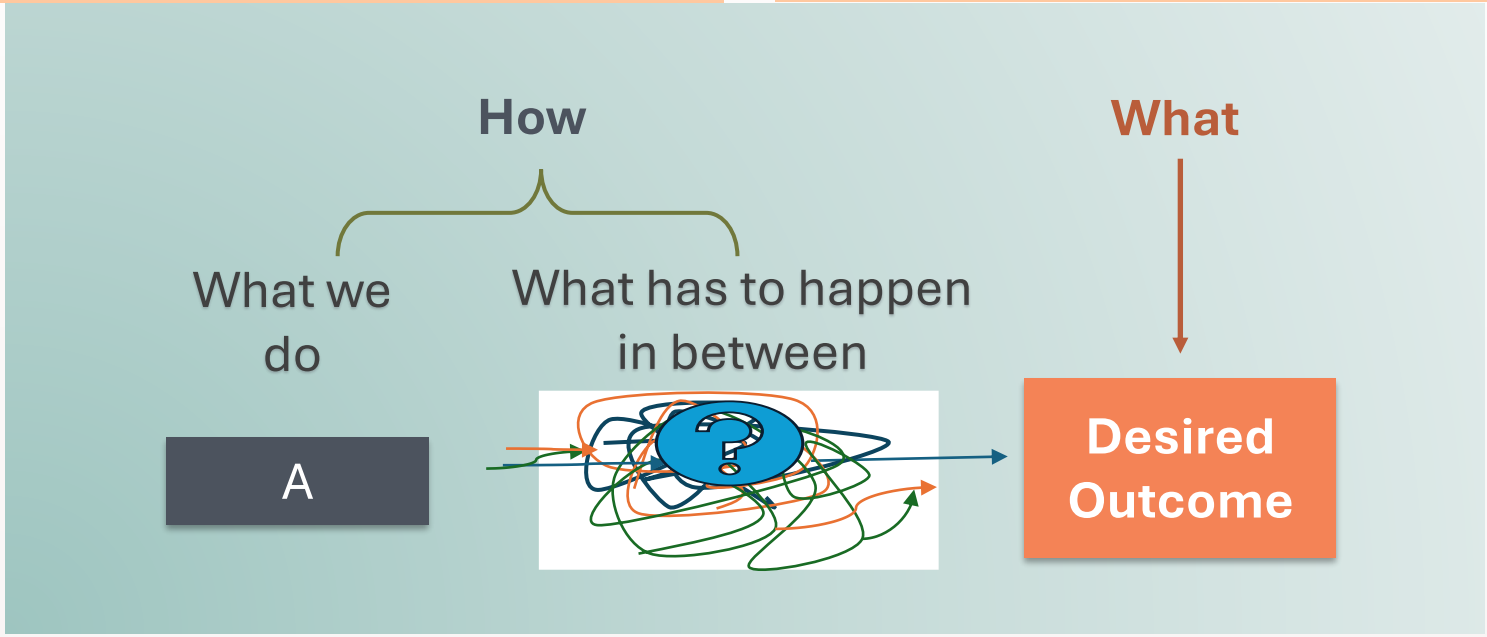
- Develop Theory of Change (TOC)
- Define PDO
- Develop results framework (RF) and M&E Plan
- Assess M&E Capacity

WHAT IS THE THEORY OF CHANGE (TOC) ?

The **TOC is an approach** that is used to define

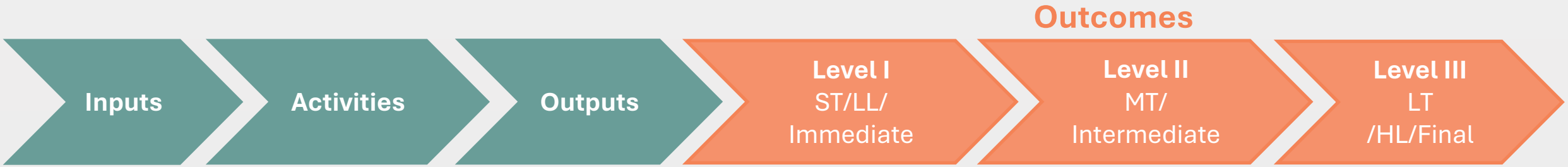
what an intervention (such as a project, program or policy) is trying to achieve;

how to achieve it in a particular context (**the causal pathways)**



RESULTS CHAIN IS CENTRAL TO TOC

Results Chain identifies inputs, activities, outputs, and outcomes



Resources committed to project activities	Tasks undertaken to generate outputs	Products to simulate achievement of results	Effects on the beneficiaries resulting from the use of outputs (the WHY)		
Financial & human resources	Build health centers	Number of health centers built	Increased population access to health centers	Improved population use of health services	Reduced population morbidity and mortality

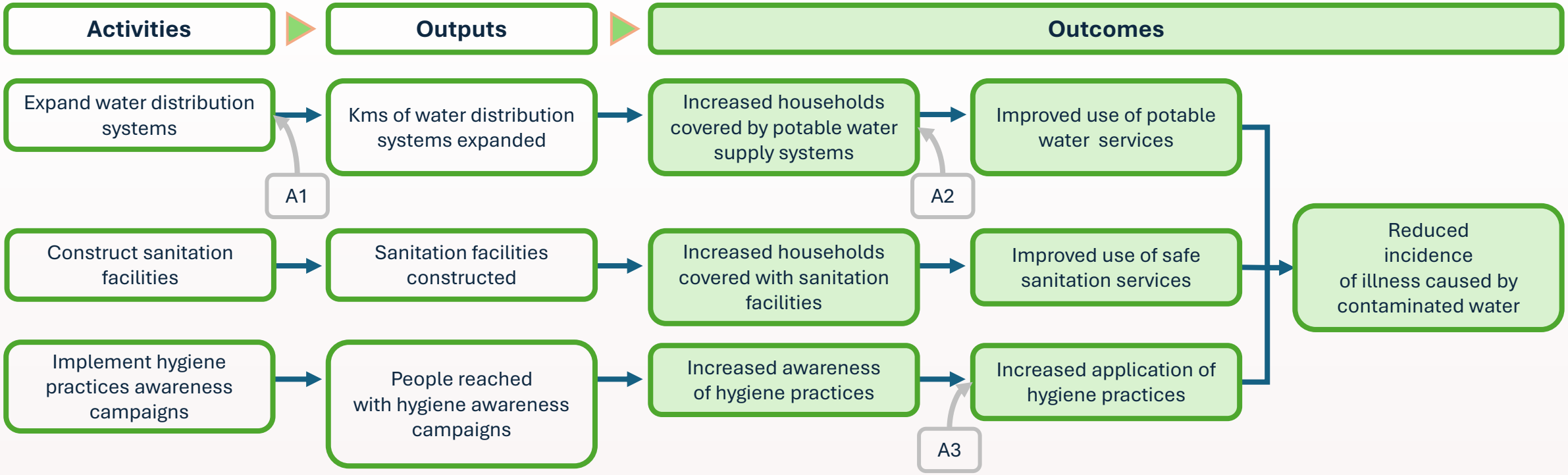
Time

- Other factors may influence achievement of outcomes
- Outcomes may not occur for a long time

TOC EXAMPLE : WATER ACCESS PROJECT

DEVELOPMENT CHALLENGE

Poor water supply, sanitation and hygiene practices adversely affect health of rural households



EXAMPLES OF CRITICAL ASSUMPTIONS

A1. Water production sources available

A2. Households with financial means to connect to water services

A3. People reached with hygiene awareness campaigns are the right target (ex. women)

THEORY OF CHANGE: BENEFITS AND USES

THE TOC BENEFITS

Develop a common understanding about the Project's design and **build consensus** among teams and stakeholders

Keep the focus on binding constraints to achieve expected outcomes and **add clarity** about what needs to happen to bring change

THE TOC USES

In the PAD to design operations by

- Clarifying **the boundaries**
- Defining **realistic PDO** and **intermediate results** for the **Results Framework**
- Identifying **relevant activities** to achieve the desired outcomes
- Identifying **assumptions** (possible risks) that should be monitored throughout implementation

In the ICR to evaluate operations by assessing **the causality logic** of actions that led to the desired outcomes

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THE PROJECT RESULTS FRAMEWORK (RF)

The RF is a strategic **planning, monitoring, and evaluation tool** used to clarify the PDO (desired outcomes) and the intermediate results that are expected to achieve it.

The RF serves as a **foundation for project M&E** during implementation and at completion

The RF is **built from the TOC**, which defines:

- The boundaries of the projects
- The outcomes to be achieved
- The intermediate results that would lead to the achievement of the outcomes

Key Elements of the RF:

- Project Development Objective (PDO)
- Results indicators with baselines and targets
- Monitoring Plan for each results indicator

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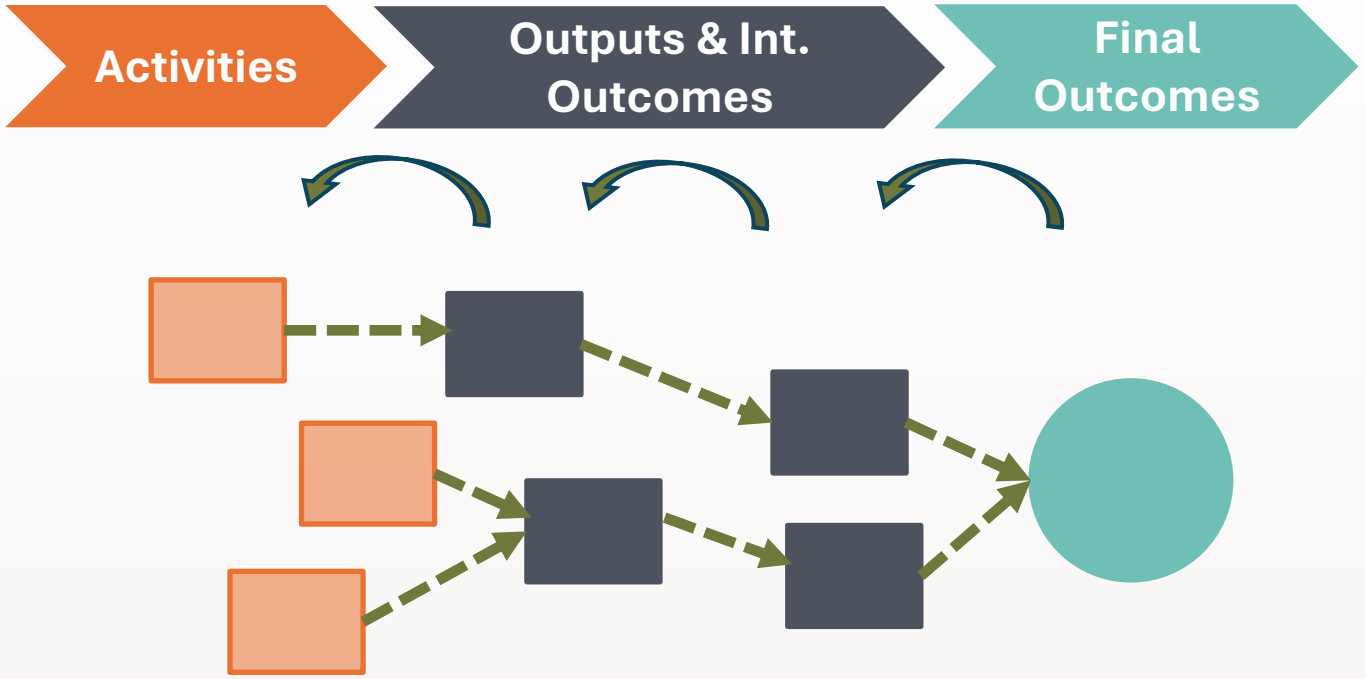
IMPORTANCE OF TOC IN OPERATIONS DESIGN



- Developing a **common understanding** about the Program's design and **building consensus** among implementing agencies, Bank teams and stakeholders

- **Keeping the focus on binding constraints** to achieve expected outcomes and **adding clarity** about what needs to happen to bring change (avoiding doing things that are good to do but don't get the desired change)

RESULT FRAMEWORK

The PDO statement should be **clear** and outcome-oriented.

PDO-level indicators are designed to **directly measure the outcomes** outlined in the PDO statement.

Intermediate result indicators are typically employed to **monitor progress** towards achieving PDO-level outcomes.

Number of indicators should align with the number of outcomes specified in the PDO statement.

"less is more"

Baseline data is collected for all indicators during project preparation.

The **project monitoring** plan should describe the methodology used to collect data for each indicator.

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PROJECT RESULTS FRAMEWORK TEMPLATE

PDO Statement: Defines the outcomes to be achieved

Project Development Objectives(s): Improve access to safe water supply and sanitation services in targeted areas							
	PBC	CRI	Unit	Baseline	Intermediate Targets (Optional)		End Targets
					Year:	Year:	
PDO Indicators by Objectives /Outcome							
Outcome 1: Increased access to improved water supply services							
• *Indicator 1:* Population provided with access to an improved water source in targeted areas			Percent	70			90
Outcome 2: Increased access to improved sanitation services							
• *Indicator 2:* Population provided with access to an improved sanitat services in targeted areas				5			70
Intermediate Results Indicators (IRIs) by Components							
Component 1: Access to safe water supply							
• *IRI 1:* Households covered with the new water distribution system			Number	0			180,000
• *IRI 2:* Km of water distribution constructed			Number	0			100
Component 2: Access to sewer system							
• *IRI 1:* Households covered with the new sewer system			Number	0			120,000
• *IRI 2:* Km of sewage system constructed			Number	0			60

Baseline: Value of the indicator at the beginning of the program

Target: Intended value of the indicator at a specified point in time

PDO Indicators: Measure outcomes specified in the PDO Statement

IR Indicators: Track progress toward achieving PDO outcomes

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M&E PLAN FOR EACH INDICATOR

Data Collection and Reporting Plan for each Indicator

Build on the administrative and institutional reporting arrangements already in place

Indicator	*Indicator 1:* Population using potable water services in targeted areas (Percent)
Definition/ Description	This indicator measures the proportion of residents in the targeted areas who are using the potable water supply services provided by the water utility (through piped household connections and community water points). The definition of 'potable water services' follows that of the Joint Monitoring Program of UNICEF and WHO
Frequency	Annual (Dec)
Data Source	Water Utility & Statistical Office
Data collection Method	- People using water services is collected from Customer's information system. - People living in the targeted areas is estimated from Census data. *The percent is calculated by dividing* (a) the number of people using potable water supply services by (b) the estimated number of people living in the targeted areas
Responsibility for Data Collection	**Water Utility** in the targeted areas

HOW TO DEVELOP PROJECT M&E ARRANGEMENTS?

With the help of an M&E Specialist

1

Involve implementing agency (s) in M&E development

- Implementing agency (s) and key stakeholders need to be involved in M&E design & use
- Information produced by the M&E system should respond to the needs of the different users

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HOW TO DEVELOP PROJECT M&E ARRANGEMENTS?

With the help of an M&E Specialist

2

Anchor the RF indictors' measurement on exiting data sources

- M&E plan should be built on systems and institutional arrangements already in place or can be built by the operation
    - Outputs usually from administrative data
    - Outcomes usually from surveys

HOW TO DEVELOP PROJECT M&E ARRANGEMENTS?

With the help of an M&E Specialist

3

Assess institutional capacity for M&E

- M&E capacity (for data collection, reporting, and use) at all levels should be assessed and supported
- Roles and responsibilities for M&E should be clear

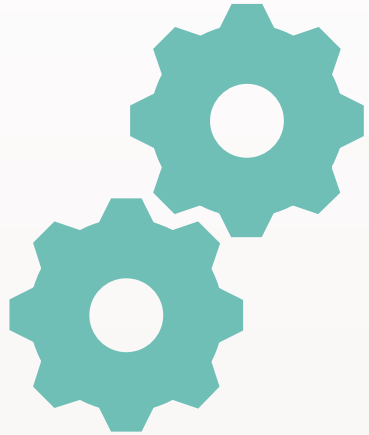
HOW TO DEVELOP PROJECT M&E ARRANGEMENTS?

With the help of an M&E Specialist

4

Include explicit activities for M&E implementation capacity strengthening

- M&E capacity at all levels should be ensured and developed, if necessary, with estimated budget
- Use of ICT should be encouraged (GPS, web-based MIS…)



IMPLEMENTATION

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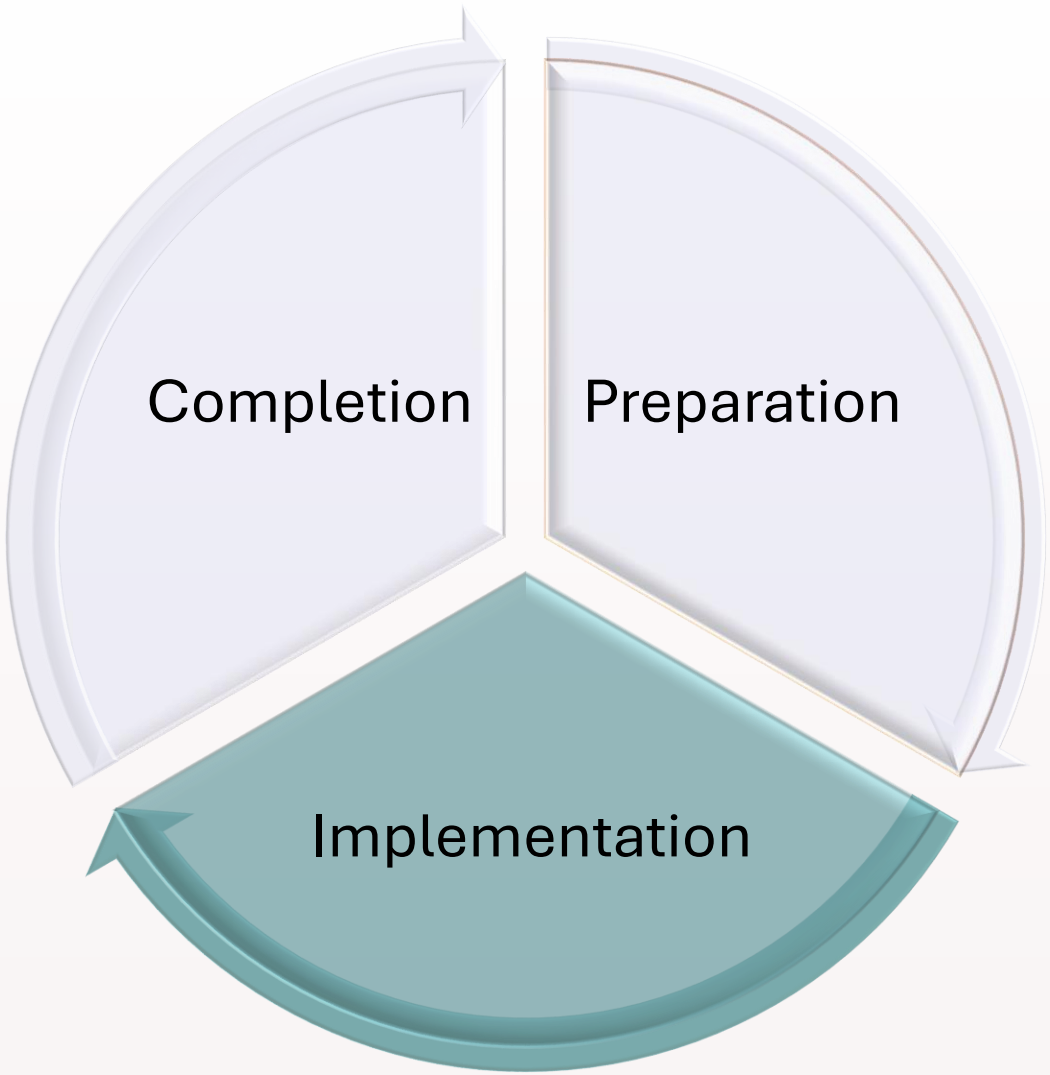
RESULTS MANAGEMENT THROUGHOUT THE PROJECT CYCLE



- Finalize M&E arrangements in M&E Manual/Chapter, as part of POM
- Set up M&E system
- Report on implementation progress and results
- Mid-Term Review
- Adapt project design, TOC, RF, and implementation arrangements, as needed

PROJECT M&E MANUAL

WHY

- Provides comprehensive description of all aspects of the M&E system
  - How the M&E system is set up
  - How the M&E system operates
- Provides description of how the project M&E system is linked with national and sectoral M&E systems

WHAT

- TOC and detailed RF
- Detailed M&E Plan and data collection tools
- Indicator definition/methodology for data collection
- Reporting and evaluation plan, including standard templates for data collection
- Management Information System
- M&E budgeting
- M&E capacity building plan

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PROJECT M&E MANUAL – GOOD PRACTICE

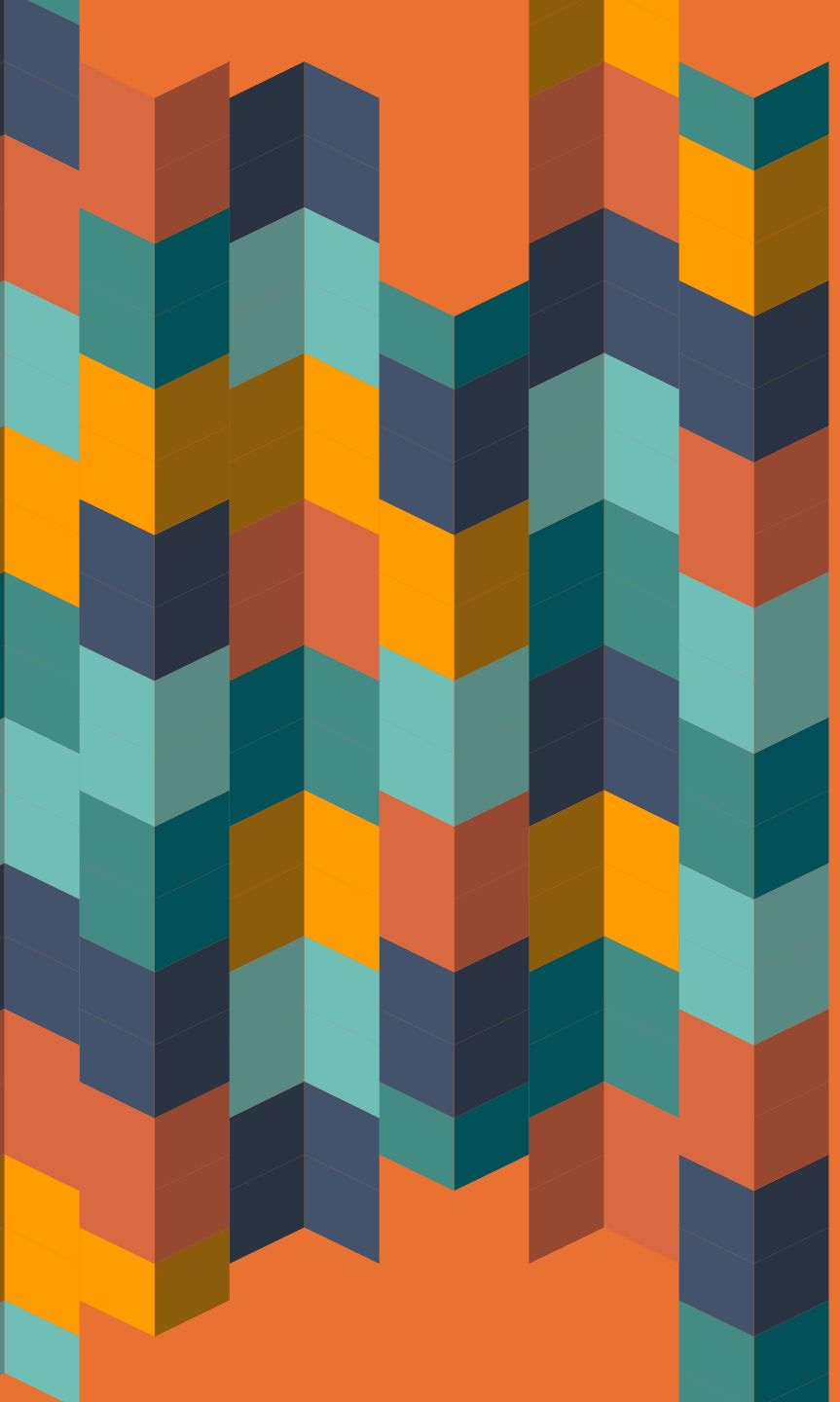
Set annual targets for results indicators

Updated as often as it is needed

Developed in a participatory process, involving all relevant agencies to ensure ownership

Training needs to be delivered to all agencies involving in data collection and reporting

Forms an annex or chapter of the Project Operations Manual (POM)



Have you used any digital or ICT tool for data collection or monitoring?

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OVERVIEW OF TYPES OF INNOVATIVE AND DIGITAL TOOLS

SMS OR PHONE-BASED SURVEYS AND SOCIAL MEDIA

Iterative Beneficiary Monitoring (IBM)

Rapid Response Phone Surveys (RRPS)

Survey of Well-being via Instant and Frequent Tracking (SWIFT)

BIG DATA

Big Data and Innovation

ITS enterprise

SOCIAL MEDIA MONITORING

Development Data Partnership

REMOTE SENSING (VIA SATELLITES AND DRONES)

Geospatial Operational Support Team

GeoLab's Geospatial platform

EO4SD-FCV program and ESA EO Clinic

Disruptive Knowledge, Information and Data Services (KIDS)

ARTIFICIAL INTELLIGENCE & MACHINE LEARNING

DEC Data Management & services

ITS Innovation & Tech Lab

THIRD-PARTY MONITORING (TPM)

TPM World Bank practice note

DATA MINING

The FCV Data Store

WBG Library

DIME analytics

World Bank-UNHCR Joint Data Center

STRUCTURED FIELD DATA COLLECTION, CUSTOMIZED DIGITAL M&E PLATFORMS

Geo-Enabling initiative for Monitoring and Supervision (GEMS)

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- GEMS is a **capacity-building initiative** leveraging **technology-based solutions** to enhance program/project **accountability and transparency**.
    - Use of **cost-free open-source tools** and **hand-held devices** to collect granular geo-tagged data that **automatically feeds into interactive platforms**.
- We support clients establish customized M&E systems for real-time data collection, remote supervision, risk monitoring, etc.

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GEMS initiative:

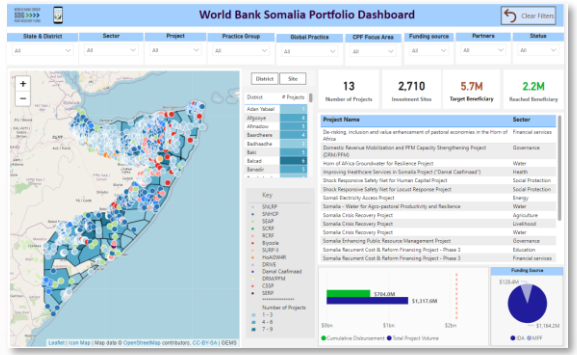
Creating a Public Good by building Digital M&E Capacity with clients, WBG staff, & partners

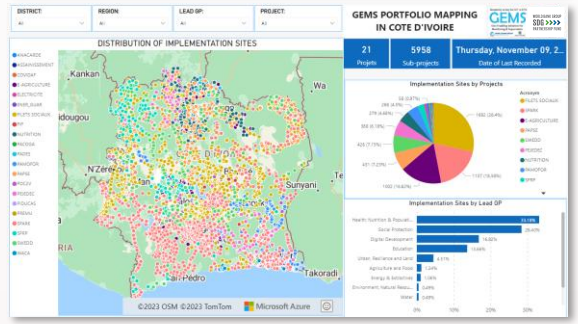
The Geo-Enabling initiative for Monitoring and Supervision (GEMS):

- Systematic use of simple ICT (smartphones/tablets) to collect granular geo-tagged data that automatically feeds into central M&E systems & dashboards.
- Leveraged for project planning, remote supervision, real-time risk monitoring, infrastructure mapping, third-party monitoring, beneficiary feedback & more.
- >12k client staff trained and deployed with >1,250 projects in 100+ countries.

Access to structured real-time data from the field, showing local dynamics, needs, and impacts across regions, sectors, and agencies

Simple, open-source technology and local capacity to enhance M&E, adaptive risk management, and impact of development interventions





For further information, just type gems/ in a WBG intranet browser, see here for the GEMS website or contact the GEMS team at the FCV Group (GEMS-team@worldbankg.org)

EXAMPLES OF GEMS USE IN THE FIELD

Scan QR code for detailed examples

>1,250 supported projects in 100+ countries

PROJECT PLANNING AND PREPARATION

Kosovo, Niger, Tuvalu, etc.

PORTFOLIO TARGETING AND PROGRAMMING

Madagascar, DRC, Somalia, etc.

PORTFOLIO MAPPING & COORDINATION

Honduras, Sri Lanka, 20+ ctries in Africa

REMOTE SUPERVISION IN CONFLICT CONTEXTS

CAR, DRC, Nicaragua, Bangladesh, etc.

PROJECT PROGRESS MONITORING

Hundreds of projects around the world

REAL-TIME RISK MANAGEMENT

Myanmar, Maldives, Brazil, etc.

MAPPING OF Gender-Based-Violence SERVICE PROVIDERS

Nigeria, Sahel, Pakistan, Mozambique

CITIZEN ENGAGEMENT AND Grievance Redress Mechanism

Azerbaijan, Burundi, Philippines

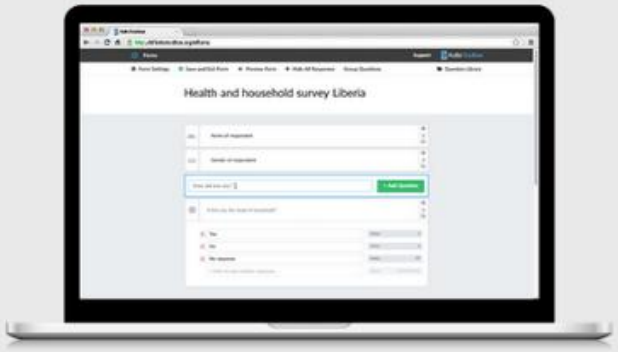
STAKEHOLDER ENGAGEMENT AND SURVEYS

Afghanistan, Haiti, Kenya, Mexico, etc.

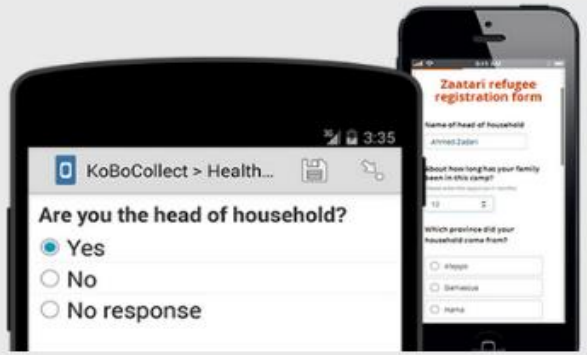
TAILORED CLIENT USE BEYOND WB OPERATIONS

Various Adoptions around the World

GEMS PROMOTES CLIENT'S USE & OWNERSHIP OF OWN DATA



BUILD FORMS AND REUSE EXISTING QUESTIONS



COLLECT DATA

ANALYZE AND MANAGE DATA

- Full **ownership** of data
- **High standard data protection** with a possibility of establishing a local server
- **Better coordination** between stakeholders

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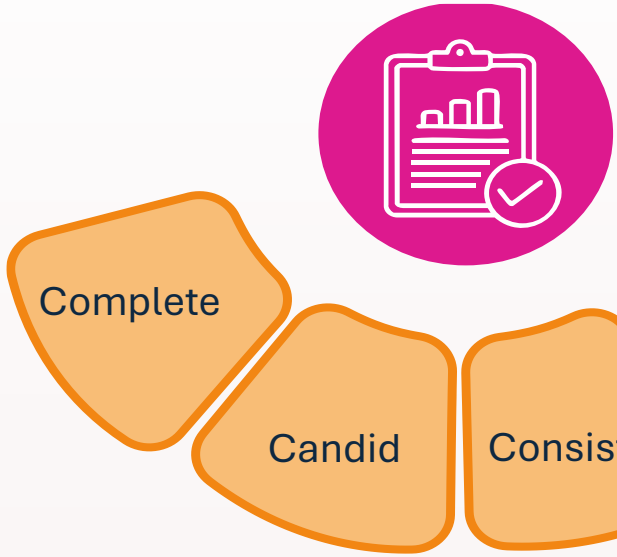
KEY CRITERIA OF A GOOD PROGRESS REPORT

The **quality of information** in the PIU Progress Report **is essential** for the Client: The key tool used to periodically inform project management about project deliverables and provide early warnings of potential difficulties

The client´s progress report is also key for preparing the Bank's Implementation Status and Results Report (**ISR**)

QUESTION: Who has access to the WB ISRs?

THE PROGRESS REPORT SHOULD BE:



All key information provided & all sections completed

Progress, issues and actions brief and to the point

Key issues are identified and documented

Overall progress consistent with components progress, results, and other performance criteria

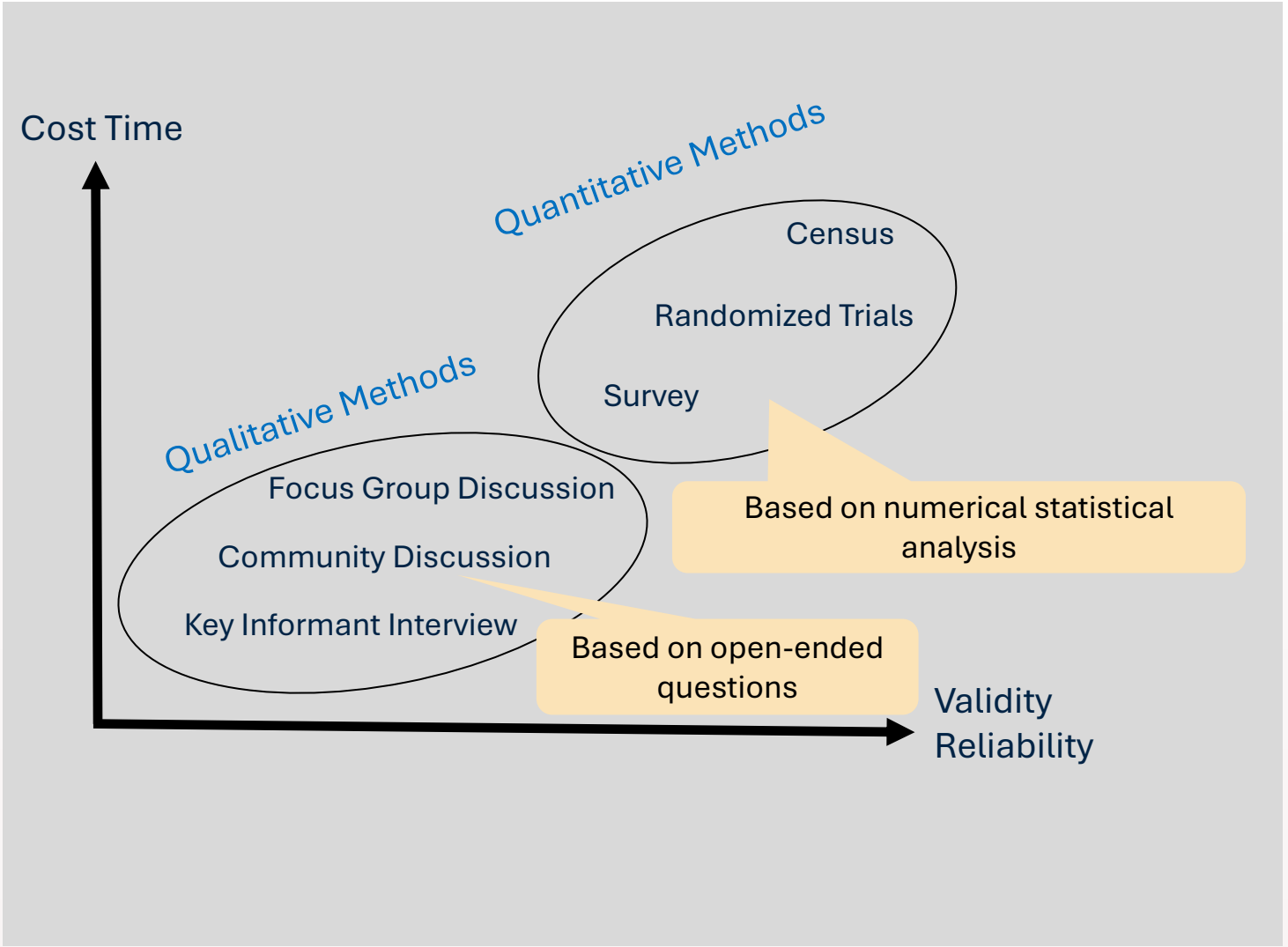
WHICH METHOD TO USE TO COLLECT M&E DATA?

Choice of data collection method depends on:

- Data type
- Data quality
- Time frame
- Resources

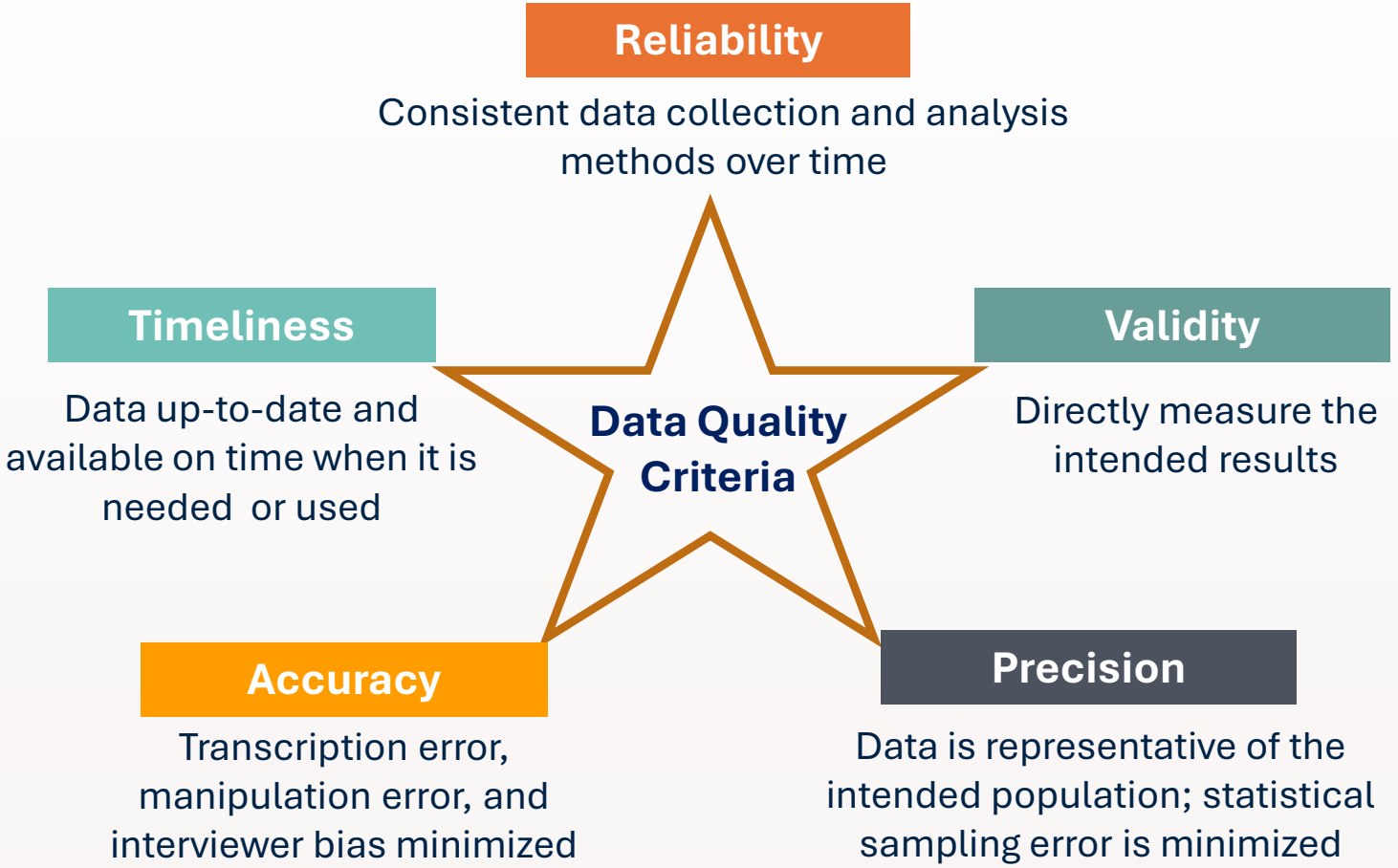
Mixed with quantitative and qualitative methods:

- Identification of most important issue (Qualitative)
- Statistical results on the issue (Survey)



WHAT ARE THE KEY CRITERIA FOR ENSURING DATA QUALITY?

- **Data quality is critical for credibility**
- **Indicators are useless without good quality data**



REPORT ON IMPLEMENTATION PROGRESS AND RESULTS

Key tool used to periodically inform project progress, results, challenges, delays, risks (prepared every 6 months)

Highlight major progress and achievements so far

Highlight significant implementation issues and constraints

Propose actions to be taken to address challenges and improve project implementation (timeline, responsible person/agencies)

Report progress of all indicators in the Results Framework (including those that did not meet annual targets)

REPORT ON IMPLEMENTATION PROGRESS AND RESULTS (II)

Key questions to address in a project progress report

- What is the progress toward achieving the PDO and intermediate results?
- What is the progress in project implementation? Are there major achievements?
- Are there significant implementation issues, constraints, and risks that could hinder implementation and results?
- Are risk mitigation measures adequate and implemented effectively?
- What actions are to be taken to address challenges and improve project implementation?

What are some examples of good M&E practices during implementation?

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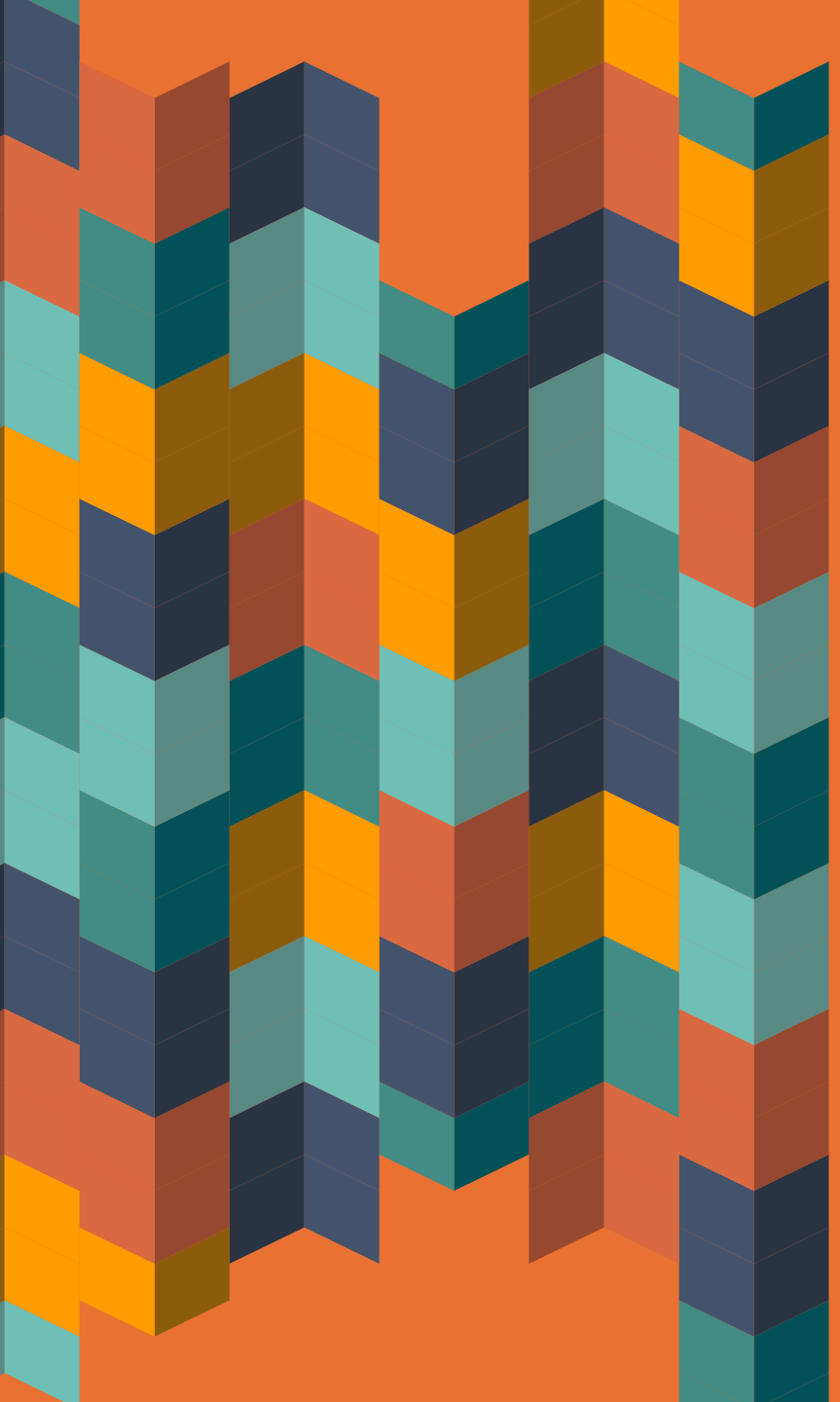
GOOD M&E PRACTICE

Baseline data should be available by project effectiveness	Within the first 6 months of implementation. Project Preparation Advance and RETF could support baseline data collection during project design.
First six months of the project	Dedicated to test that the methodology for data collection of each result indicator. The data can be generated/verified and adjusted.
Adequate resources	M&E implementation, routine monitoring, including data cleaning and verification.
Qualified M&E staff	Recruited to join PIUs from the beginning of the project to support design and implementation

GOOD M&E PRACTICE

Implementation	Assess whether M&E system/capacity is in place and whether M&E data were collected, validated, and analyzed in a methodologically sound manner.
Utilization	Assess whether M&E data on performance and results progress were used to inform project management, planning, and decision-making.
Restructuring in a timely manner	Address changes to the indicators and targets. If issues were identified during the early stage of implementation, team should not wait until MTR to take action.
Third-party monitoring	Can be considered to support M&E based on needs, including in fragile and conflict-affected areas.

COMPLETION



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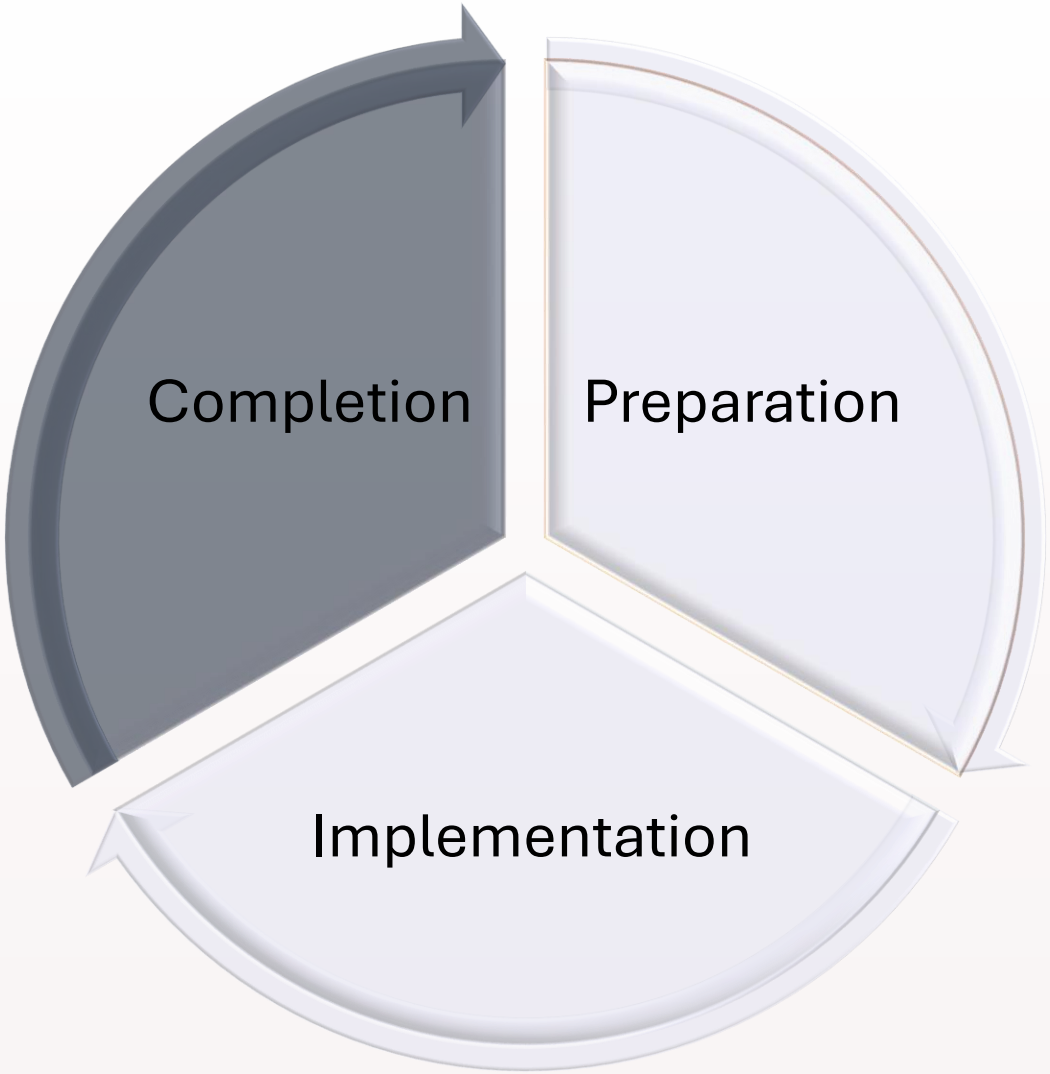
RESULTS MANAGEMENT THROUGHOUT THE PROJECT CYCLE



- Prepare the implementation completion report
  - Evidence of achievements and impacts
  - Validate TOC
  - Document lessons learned
- Prepare handover of the M&E system for sustainability

IMPLEMENTATION COMPLETION AND REPORT

(ICR)

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WHY IS ICR IMPORTANT?

BEFORE

AFTER

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WHY IS THE ICR IMPORTANT?

An ICR is one of the main instruments for self-evaluation prepared by World Bank Group for each completed operation

Accountability for performance and results

Lesson learning and knowledge sharing for future operations

Internal Audience: Board members, Bank managers, and staff

External Audience: Governments and their agencies, stakeholders, beneficiaries, and general public

Public Document

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PROJECT STORYLINE AND OBJECTIVES

Provide a clear description of the project story line, objectives, and key indicators

Document any significant changes introduced during implementation

Present the theory of change to describe the logic behind the operation:

- Illustrate the results chain
- Highlight the PDO at the level of the desired outcomes
- Describe the longer-term outcomes expected to occur beyond the project's closing.

ASSESSING THE PROJECT OUTCOME

Alignment of the PDOs with the current CPF objectives

Costs involved in achieving the results were reasonable

Achievements of objectives (PDO)

The World Bank's project evaluation design is **objectives-based**

The definition of the Outcome rating is: "*the extent to which the operation's **objectives** were **achieved efficiently***"

PROJECT DEVELOPMENT OBJECTIVES ACHIEVEMENTS

Provide robust evidence during assessment

Explain plausible causal relationship between activities/outputs and achieved outcomes and impact

Discuss non-project factors that may have affected the observed outcomes

Example 1:
Putting the results in context. A **100 kilometer** road had a **two kilometer** stretch wiped out in a flood.
You can defend the project as follows: **98% of the road survived,** and elsewhere in the country, whole roads were wiped out by the flood.

Example 2: In an agricultural project of increasing yield of farmers. An impact evaluation is done and at the project's end there was a drought and farmers were expecting yield to increase by **20 percent** but the yield fell because of drought.
Therefore, there seems to be a **negative impact** due to the project. But an impact evaluation in an area outside the project shows that in that area the yield fell a lot more. So even if the target was not met, the project helped to reduce the impact of the drought.

EFFICIENCY ASSESSMENT

Efficiency is a measure of how economically resources and inputs are converted to results: "**value for money**".

The efficiency discussion should report on **both**:

Economic Analysis (as applicable).

For example: net present value, economic rate of return, cost effectiveness, etc.

Implementation Efficiency.

Aspects that may reduce efficiency: delays in implementation of key activities, frequent staff turn-over, etc.

OVERALL OUTCOME RATING

The **overall Outcome rating** is derived from weighing ratings of the Relevance, Efficacy, and Efficiency.

High or Substantial on Efficacy	→	Necessary for a project to receive an Outcome rating of Moderately Satisfactory or higher.
Negligible	→	Produces an Outcome rating that is unsatisfactory.

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HOW TO DERIVE LESSONS LEARNED?

- **Provide analysis** of the key factors and events (during preparation and implementation) that contributed to the project's achievement and lack of achievement

Organize the analysis by category of key factors

- Factors subject to the **government control**
- Factors subject to the **World Bank control**
- Factors **outside the control of government**

- Use the findings from key factors (Section III) to present:

  3 to 5 significant lessons learned

  1- 2 recommendations that may be applicable beyond the project

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IEG IMPLEMENTATION COMPLETION AND RESULTS REPORT REVIEW (ICRR)

World Bank team *prepares* the ICR based on Government's ICR:

- Assesses & provide the **overall outcome ratings** (based on the ratings of relevance, efficacy, & efficiency)
- Describes and rates **M&E, Bank's performance**
- Assess the **risk** to development outcomes.
- Derives a summary of **lessons learned**

Then IEG reviews the ICR:

Reviews & validates the overall **Outcome ratings**, the ratings of **M&E quality**, and **Bank Performance**

Rates **ICR** overall **quality**

Formulates **lessons learned** based on own observations

Adds ratings data to the **longitudinal dataset**

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ICR RATINGS

ICR Ratings get downgraded because of gaps

Clarity of Objectives:

- Clear and well-defined objectives is key

Quality of supporting evidence:

- project accomplishments are convincingly documented

Relevance of indicators:

- Closely related to Objectives

Quality of Monitoring an Evaluation:

- Evidence that a good quality of M&E system was set up and utilized.

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WRAPPING UP M&E SESSION: KEY TAKE-AWAYS

1. M&E is everybody's business: Know your Theory of Change, the Results Framework and progress status on the Indicators
2. A strong Theory of Change and Results Framework and detailed M&E Plan is the backbone of the M&E System (use digital tools where applicable)
3. Make sure you have a complete Project M&E Manual as early as possible
4. Without an appropriate M&E Budget the M&E System is likely not going to work
5. Integrate the project M&E system into the government structures and include capacity building
6. Make the M&E System useful for the key users
7. Progress Reports, Midterm Reviews and Completion Reports are the main outputs of the M&E system

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THANK YOU!

Questions?

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